Handout 4: Case Management Plan

Planning

Planning is a process focused on identifying client needs, clarifying goals and hopes, setting priorities and identifying steps/actions necessary to achieve this. It is client driven and empowers the client. Goals may be very small and concrete as well as longer-term and broad.

Planning is centred around the development of a support plan which addresses the needs of the client as identified in the assessment process. The formulation of the case management plan:

• Establishes goals and expectations and identifies appropriate services for each client as perceived by the client

• Is developed on the basis of information collected during the assessment process

• Assists each client to identify short-term and long-term goals, and action plans.

Developing a Planning Process

The key tasks in a planning process could include:

• **Identifying appropriate community resources.** Services need to be aware of the other services and resources available in the community which may be able to assist CPCC clients. (e.g. develop a directory of services)

• **Developing a tool to assist the service such as a support plan.** It provides a written record of the plan, which the service and the client have developed together to meet the client's needs. Client issues which may be addressed in the support plan include the following:

  • What does the client need in the immediate future to stabilize the current situation? (Crisis needs)

  • What is the client's long-term goal?

  • What is stopping the client from achieving this goal?

  • What can be done in the short-term to help achieve this long-term goal?

  • What does the person want to achieve or resolve whilst a client of the service?

  • What action the client can take?

  • What action can be taken by the agency?
• Time frames for action.

• **Developing a tool to assist clients.** Clients should be given a copy of the support plan.

• **Developing written policies and procedures** including:
  • Who does the planning
  • When and how planning is done
  • The use of tools including written support plans.

• **Making sure the plan addresses the needs identified** in the assessment process including the needs of all family members.

**As Workers We Need to Remember**

• **Goals should be achievable.** If the goals are broad they need to be broken into smaller groups. Develop contingency plans so that if one goal cannot be met, there are alternatives.

• **Make sure the client feels ownership** of the plan, that they understand it, and have a copy written in their own words and language.

• **Support plans should focus on achieving** the skills or resources necessary for independence from the Carmen Poldis Community Centre and should lead towards case closure.

**Resistance to Planning**

Resistance may occur in the following forms:

• Disbelief that things can change

• Cynicism

• Inability to think clearly

• Inability to organize themselves

• Lack of motivation

• Impatience.

**Ways to Counter this Resistance**

• Empathy

• Encouragement

• Positive Approach

• Work with others such as close friends, counsellors.